

RECEIVED  
SECRETARY OF THE SENATE  
PUBLIC RECORDS

2019 MAR 25 PM 3:38

To the Office of Public Records:

Enclosed is Senator Portman's post-trip filing for privately sponsored travel from March 7-10, 2019.

Let me know if you have any questions,



Andrew Polesovsky

Senator Rob Portman  
Chief Investigator and Counsel  
Permanent Subcommittee on Investigations  
202-224-8539

00000000001124

# SENATORS AND OFFICERS POST-TRAVEL DISCLOSURE OF TRAVEL EXPENSES

Date/Time Stamp:  
RECEIVED  
SECRETARY OF THE SENATE  
PUBLIC RECORDS

2019 MAR 25 PM 3:38

This disclosure, along with a copy of the Private Sponsor Travel Certification Form and all attachments, MUST be provided to the Office of Public Records, Room 232 of the Hart Building, within 30 days after the travel is completed.

In compliance with Rule 35.2(a) and (c), I Sen. Rob Portman, make the following  
(Name of Senator/Officer)

disclosures with respect to travel expenses that have been or will be reimbursed/paid for me.

Private Sponsor(s) (list all): American Enterprise Institute

Travel date(s): March 7-9, 2019

Destination(s): Sea Island, GA

Name of accompanying family member (if any): Jane Portman

Relationship to Member/Officer: ☒ Spouse ☐ Child

FILL IN THE APPROPRIATE LINES. IF THE COST OF LODGING DID NOT INCREASE DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

## Expenses for Senator/Officer:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	\$837.62 (\$287.50 round trip airfare, \$550.12 round trip ground transportation)	\$912.62 (2 nights)	\$160 (2 breakfast) (2 lunch) (1 dinner)	N/A
<input checked="" type="checkbox"/> Actual Amount				

## Expenses for Accompanying Spouse or Dependent Child (if applicable)

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	\$0 (flights not purchased by AEI)	\$0 (lodging shared w/ spouse)	\$160 (2 breakfast) (2 lunch) (1 dinner)	N/A
<input checked="" type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): Itinerary attached.

I HAVE MADE A DETERMINATION THAT THE TRAVEL DESCRIBED ABOVE WAS IN CONNECTION WITH MY DUTIES AS AN OFFICEHOLDER, AND DID NOT CREATE THE APPEARANCE THAT I WAS USING PUBLIC OFFICE FOR PRIVATE GAIN.

March 18, 2019

(Date)

Rob Portman  
(Signature of Senator/Officer)



## PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors): The American Enterprise Institute
2. Description of the trip: World Forum focuses on creative and forward-looking ideas in pursuit of independent and innovative policy solutions with real-world impact.
3. Dates of travel: March 7-9, 2019
4. Place of travel: Sea Island, Georgia
5. Name and title of Senate invitees: Sen. Portman and the attached list of confirmed speakers.
6. I *certify* that the trip fits one of the following categories:  
☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.  
- OR -  
☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.  
- AND -  
☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I *certify* that:  
☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.  
- AND -  
☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

GO  
CN  
T  
T  
C  
C  
C  
C  
C  
C  
C  
C

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

- OR -

- OR -

**10. USE ONLY IF YOU CHECKED QUESTION 9(B)**

---

---

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

AEI is responsible for all the logistical aspects of getting the Senator to and from the conference.

AEI is a non-profit, tax-exempt, public policy research organization. The World Forum seeks to encourage frank and free-ranging conversations over a number of public policy issues important to today's world. AEI expects the Forum to inspire ideas that expand human dignity and human potential at home and abroad.

This is the 37th year of the World Forum. Each Forum, AEI invites a number of public officials to join the conversation. Members from both the House and the Senate regularly attend.

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

AEI hosts around 250 public events each year. In addition to distributing other educational materials via online resources, including the AEI website and emails. These products cover a number of topics and seek to encourage the competition of ideas.

- 16. Total Expenses for Each Participant:**

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate  <input type="checkbox"/> Actual Amounts	\$1125.12 1 round trip flight for one person and Ground transportation both ways.	\$912.62 2 Night	\$320 2 - Breakfast 2 - Lunch 1 - Dinner (2 People)	N/A

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

**This trip is arranged without regard to congressional participation.**

18. Reason for selecting the location of the event or trip

The hotel is in close proximity to East Coast and easily accessible by multiple airports.

19. Name and location of hotel or other lodging facility:

## The Cloister at Sea Island

100 Cloister Drive, Sea Island, Georgia 31561

20. Reason(s) for selecting hotel or other lodging facility:

The hotel is in close proximity to East Coast and easily accessible by multiple airports.



**PRIVATE SPONSOR TRAVEL CERTIFICATION FORM**

**SIGNATURE PAGE FOR ADDITIONAL SPONSOR**

*(to be completed by each additional sponsor)*

I hereby *certify* that the information contained on pages 1-4 of the certification form and any accompanying addenda, all submitted in connection with the March 7-9, 2019 trip  
to Sea Island, Georgia is true, complete, and correct.  
*Place of Travel* *Dates of Travel (Month Day, Year)*

Signature of Travel Sponsor: 

Name and Title: Jessica Browning, Director of Special Events

Name of Organization: The American Enterprise Institute

Address: 1789 Massachusetts Ave NW, Washington, DC 20036

Telephone Number: 202.862.5853

Fax Number: N/A

E-mail Address: jbrowning@aei.org

00000000001131

AEI WORLD FORUM, March 7-10, Sea Island, Georgia

ADDENDUM: Question 21:

The lodging cost per day (\$456.31/night) is higher than the per diem rate of the area. Senate participants will be placed in standard rooms. Since this is a large conference, this was the lowest cost and closest to the per diem rate that AEI could secure, given the hotel's prices. The cost of meals (\$27/breakfast, \$33/lunch, \$40/dinner) reflects the catering cost charged to AEI by the hotel. Alcohol is not included. This trip was arranged without regard to congressional participation, and we verify that no special treatment was given to members in either lodging or food.

**Thursday, March 7**

## Friday, March 8

## Saturday, March 9

## Sunday, March 10

*As of January 16, 2019 | Subject to change*

## 2019 Speakers

ALEXANDER ACOSTA, US Secretary of Labor  
 YOUSEF AL OTAIBA, United Arab Emirates Ambassador to the United States  
 DAVID BROOKS, Columnist, *New York Times*  
 ERIK BRYNJOLFSSON, Professor, Massachusetts Institute of Technology Sloan School of Management  
 SHELLEY MOORE CAPITO, US Senate (R-WV)  
 JEAN CASE, Chairman, National Geographic; CEO, The Case Foundation  
 STEVE CASE, Chairman and CEO, Revolution; Cofounder, AOL  
 ELAINE L. CHAO, US Secretary of Transportation  
 DICK CHENEY, Former Vice President of the United States  
 SUSAN COLLINS, US Senate (R-ME)  
 TIM COOK, Chief Executive Officer, Apple Inc.  
 JOHN CORNYN, Senate Majority Whip (R-TX)  
 TOM COTTON, US Senate (R-AR)  
 DAN CRENSHAW, US House of Representatives (R-TX)  
 TED CRUZ, US Senate (R-TX)  
 MITCH DANIELS, President, Purdue University  
 JOHN K. DELANEY, Former US House of Representatives (D-MD)  
 DOUG DUCEY, Governor of Arizona  
 ELIZABETH ECONOMY, Director, Asia Studies, Council on Foreign Relations  
 MARTIN FELDSTEIN, George F. Baker Professor of Economics, Harvard University  
 MIKE GALLAGHER, US House of Representatives (R-WI)  
 PAUL GIGOT, Editorial Page Editor, *Wall Street Journal*  
 JOSH GOTTHEIMER, US House of Representatives (D-NJ)  
 MICHAEL GOVE, UK Secretary of State for Environment, Food and Rural Affairs  
 LINDSEY GRAHAM, US Senate (R-SC)  
 PHIL GRAMM, Vice Chairman, Lone Star Global Acquisitions Ltd.  
 HUGO GURDON, Editorial Director, *Washington Examiner*  
 BILL HASLAM, Former Governor of Tennessee  
 KEVIN HASSETT, Chairman, Council of Economic Advisers  
 JIM HIMES, US House of Representatives (D-CT)  
 GLENN HUBBARD, Dean, Columbia Business School  
 JOEL KOTKIN, Chapman University; Center for Opportunity Urbanism  
 NICHOLAS KRISTOF, Op-Ed Columnist, *New York Times*  
 BILL KRISTOL, Founding Director, Defending Democracy Together  
 JON KYL, Former US Senator (R-AZ); AEI  
 MIKE LEE, US Senate (R-UT)  
 LEONARD LEO, Executive Vice President, Federalist Society  
 YUVAL LEVIN, Editor, *National Affairs*  
 MITCH MCCONNELL, Senate Majority Leader (R-KY)  
 ROBERT NELLER, Commandant of the Marine Corps  
 JIMMY PANETTA, US House of Representatives (D-CA)  
 DAVID PERDUE, US Senate (R-GA)  
 MIKE POMPEO, US Secretary of State  
 ROB PORTMAN, US Senate (R-OH)  
 DINA POWELL, Partner, Investment Banking Division of The Goldman Sachs Group Inc.  
 MARTA LUCÍA RAMÍREZ, Vice President, Republic of Colombia  
 WILBUR ROSS, US Secretary of Commerce  
 NORMAN ROULE, CEO, Pharos Strategic Consulting LLC  
 IAN ROWE, CEO, Public Preparatory Network  
 BEN SASSE, US Senate (R-NE)  
 ISABEL SAWHILL, Senior Fellow, Economic Studies, Brookings Institution  
 ANDREW SELEE, President, Migration Policy Institute  
 MARTIN SELIGMAN, Director, Positive Psychology Center, University of Pennsylvania  
 GENE SPERLING, Former Director, National Economic Council  
 ELISE STEFANIK, US House of Representatives (R-NY)  
 FRANCIS SUAREZ, Mayor, City of Miami  
 THOMAS SUOZZI, US House of Representatives (D-NY)  
 A. G. SULZBERGER, Publisher, *New York Times*  
 LAWRENCE H. SUMMERS, Charles W. Eliot University Professor, Harvard University  
 ASTRO TELLER, Captain of Moonshots, X  
 FRED UPTON, US House of Representatives (R-MI)  
 JOSEPH JAUSHIEH WU, Minister of Foreign Affairs, Republic of China (Taiwan)  
 MARK ZANDI, Chief Economist, Moody's Analytics



# 2019 AEI World Forum

## Itinerary, Senator Rob Portman

Thursday, March 7

7:10 PM – Arrival, Arrival, Jacksonville International Airport

8:30 PM – Arrival, The Cloister at Sea Island

Friday, March 8

7:30–8:30 a.m.

Early Bird Breakfasts

The Cloister

**Choose one of the below:**

### **A Conversation with Jean and Steve Case**

Robert Doar (Moderator)

A conversation on the three's shared commitment to lifting up those traditionally left behind in our society. They will discuss how policies, the Internet, and support for entrepreneurship can increase opportunities for economically disadvantaged Americans.

### **A Conversation with Secretary of Labor Alex Acosta**

Stan Veuger (Moderator)

A conversation about the issues and policies being worked on by the Department of Labor.

### **A Conversation with Secretary of Commerce Wilbur Ross**

Phil Gramm (Moderator)

A conversation about the issues and policies being worked on by the Department of Commerce.

8:45–10:15 a.m.

Breakout Sessions

The Cloister

**Choose one of the below:**

### **Economic Policy at the Halfway Point**

Glenn Hubbard

Gene Sperling

Michael Strain

Kevin Warsh

Mark Zandi

Stan Veuger (Moderator)

Two years in, what is the state of the administration's economic policy agenda? Is the 2017 tax law working as lawmakers hoped? Has the administration's trade policy accomplished what it intended? How successful has its deregulatory agenda been? And what is the policy outlook for the rest of the president's term?

### **The US vs. China: Who Is Winning in Great Power Competition?**

Dan Blumenthal

Elizabeth Economy

Oriana Skylar Mastro

Larry Summers

Derek Scissors (Moderator)

In 2008, China appeared at the top of its game, hosting the Olympics and achieving another year of solid growth. Over a decade later, however, the question of whether China's rise is truly peaceful continues to vex policymakers and scholars alike. The United States and the People's Republic of China are clearly engaged in long-term strategic competition, but does China truly challenge US economic, political, or military hegemony? Does it even want to? How can Washington best manage the risks and continue to reap the rewards of a more aggressive China?

10:30 a.m.–12:00 p.m.

General Session

The Cloister

**Polarization and Extremism in Policy and Politics**

John Delaney  
 Rahm Emanuel  
 Kevin Hassett  
 Glenn Hubbard  
 Frederick Kagan  
 David Perdue  
 Gene Sperling  
 Michael Strain  
 Liz Truss

Danielle Pletka (Moderator)  
 Ryan Streeter (Moderator)

Americans are drifting away from traditional policy positions and ideological principles. Some conservatives have abandoned traditional concern about debt and deficits, are moving away from free trade, and have de-prioritized entitlement reform. Similarly, some liberals are advocating for more than doubling the federal minimum wage, guaranteeing employment with the federal government to every American who wants a job, instituting Medicare for All, and providing free higher education. Why is bipartisanship and working together crucial during a time when the tone of political discourse has become ever shriller? Are there any specific policies that can be agreed upon to make progress?

12:15–1:45 p.m.

Luncheon

The Beach Club

### **Media in the Age of Populism**

Paul Gigot  
 Fred Hiatt  
 AG Sulzberger  
 Ramesh Ponnuru (Moderator)

The New York Times, the Wall Street Journal, and the Washington Post are the three most prominent newspapers in the country. The editors of their editorial pages will reflect on the challenges of public debate in the current social climate and at a time of rapid change in the media industry.

2:00–3:15 p.m.

Afternoon Sessions

The Cloister

### **Choose one of the below:**

#### **Are Values the Next Phase of Education Reform?**

Betsy DeVos  
 Ian Rowe  
 Ben Sasse  
 Isabel Sawhill  
 Nat Malkus (Moderator)

Over the past 25 years, education reformers have made substantial progress through charter schools, vouchers, and other reforms, usually measuring progress by rising test scores. But has the narrow pursuit of test scores kept us from more controversial conversations about the values that are fundamental to students' long-term success? Students who make good early-life choices, even those with suboptimal test scores, attain the outcomes that we care about later in life. Yet we avoid value-laden conversations about these choices in public schools for fear of coming off as anachronistic, paternalistic, or out of touch. What values should public schools teach? How can we reform our approach to education reform to give values their proper place?

#### **Artificial Intelligence, Big Tech, and National Security**

Erik Brynjolfsson  
 Frederick Kagan  
 Eric Schmidt  
 Bret Swanson  
 Astro Teller  
 Jim Pethokoukis (Moderator)

Will artificial intelligence (AI) usher in an era of explosive economic growth? How disruptive will the AI and automation revolutions be? Is there a dark side to technological advances? Should we be concerned about Big Tech and privacy, the ability of technology to mislead and misinform, and biased algorithms? Are we ready for high-tech weapons and cyber challenges to sovereignty? And what is the government's role in all this?

#### **Gettysburg: Reexamining America's Turning Point**

Giselle Donnelly  
 Gary Schmitt

The Battle of Gettysburg proved an epic turning point for the United States, for the world, and for the cause of human liberty. The men who met on the rich farmlands of Pennsylvania sensed the importance of the moment, yet they had little

CO  
 N  
 T  
 E  
 N  
 T  
 S



Mitch Daniels  
Nick Eberstadt  
Michael Gove  
Jim Himes  
Nicholas Kristof  
Bill Kristol  
Larry Summers  
George Will  
Paul Gigot (Moderator)

One of the most startling events of recent years has been the collapse around the world of institutional authority and respect in so many areas of public life. Whether it is trust in Congress, faith in the authority of the Catholic Church, confidence in the press, a sense of unity with allies, or confidence in long-standing and established political parties, public opinion surveys reflect a growing discontent with established social, political, economic, and religious institutions. What does this mean for the United States and the world? Is this a temporary phenomenon? And how should public leaders—and institutions themselves—seek to move forward?

12:45–2:15 p.m. Luncheon The Beach Club  
**Reshaping the Courts: A View from the Inside**

Leonard Leo  
Mitch McConnell  
John Yoo (Moderator)

A discussion on what has happened on the judicial appointments front for the past two years.

2:05 PM – Departure, The Cloister at Sea Island

5:05 PM – Flight departs, Jacksonville Airport

000000001138